

**TM-2 PREPARER COURSE**

**USING NASA'S TRAVEL MANAGER SYSTEM**

**AMEND A TRAVEL AUTHORIZATION**

This document covers the steps to amend an authorization.

**Trip Information**

**1. Lodging and M&IE**

Change Lodging costs to \$0.00 for 05/14/02 & 05/16/02 – contract hotel became available on 05/14/02.

Other Authorizations:

Select Other Authorization for Contract Hotel and enter the following information:

Hotel: Savoy Suites  
Contract #: NASW-1234  
Confirmation #: CVBEB6

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## A. CREATE A NEW DOCUMENT

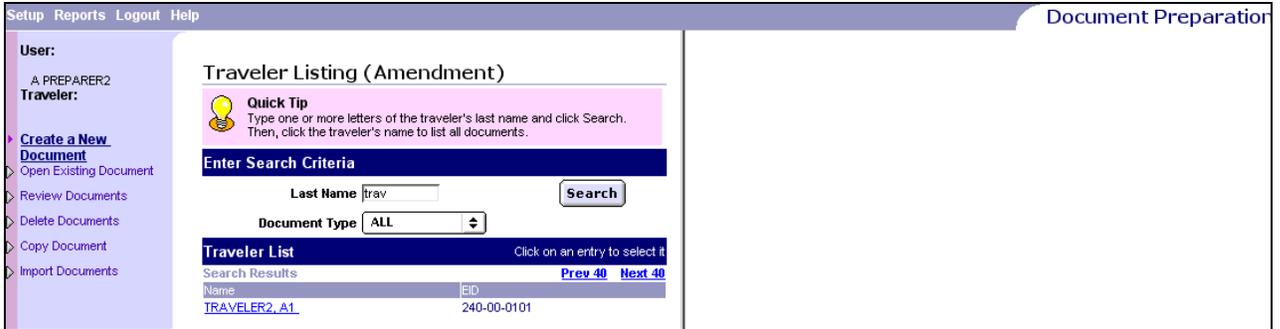
1. Click the **Create a New Document** link on the Document Processing Toolbar on the left side of the page. The **New Document** page will be displayed, as shown below.

The screenshot shows the 'New Document' page in the Gelco Travel Manager 8.0 interface. The page is titled 'New Document' and features a 'Quick Tip' box with a lightbulb icon. The 'Quick Tip' text reads: 'To select a traveler, click on the SSN or Traveler Name lookup button. Enter the Document name as: Center ID-(hyphen) Organization Code MM-DD (month-day to begin travel) State, City, or Country of destination.' Below the tip, there are three dropdown menus: 'Document Type' (set to 'Authorization'), 'Document Name' (set to 'Authorization Voucher'), and 'SSN' (set to 'Local Voucher'). The 'Traveler Name' dropdown is open, showing 'Amendment' and 'Voucher from Authorization'. To the right, there is a section titled 'For this Document you can:' with buttons for 'Add Traveler to Travel Manager', 'Auto Name this Document', and 'Create this Document'. The left sidebar shows the user 'Susan Smith' and a 'Traveler:' section with a 'Create a New Document' link highlighted.

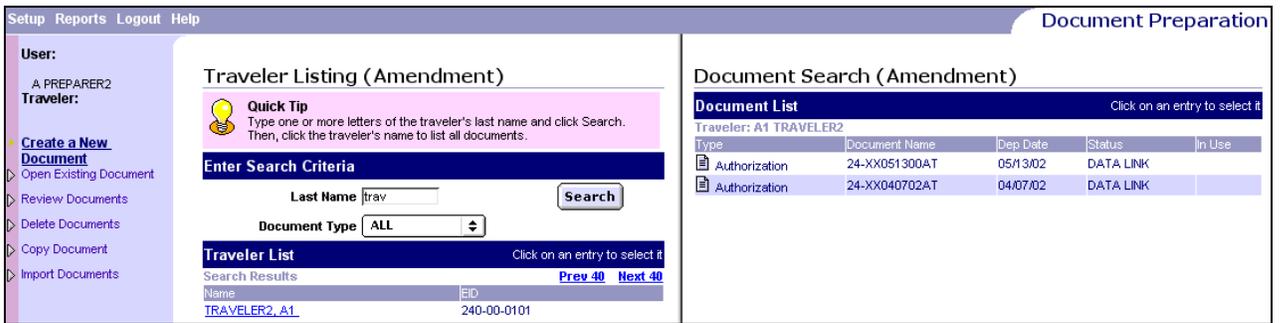
2. Select **Amendment** from the **Document Type** drop down selection list and click in the **Document Name** field. The **Traveler Listing (Amendment)** page will be displayed.

The screenshot shows the 'Traveler Listing (Amendment)' page in the Gelco Travel Manager 8.0 interface. The page is titled 'Traveler Listing (Amendment)' and features a 'Quick Tip' box with a lightbulb icon. The 'Quick Tip' text reads: 'Type one or more letters of the traveler's last name and click Search. Then, click the traveler's name to list all documents.' Below the tip, there is an 'Enter Search Criteria' section with a 'Last Name' field containing 'trav' and a 'Search' button. Below that, there is a 'Document Type' dropdown set to 'ALL'. The 'Traveler List' section shows a table with a header 'Name' and a search results area. The table is currently empty. To the right, there are navigation links 'Prev 40' and 'Next 40'. The left sidebar shows the user 'A PREPARER2' and a 'Traveler:' section with a 'Create a New Document' link highlighted.

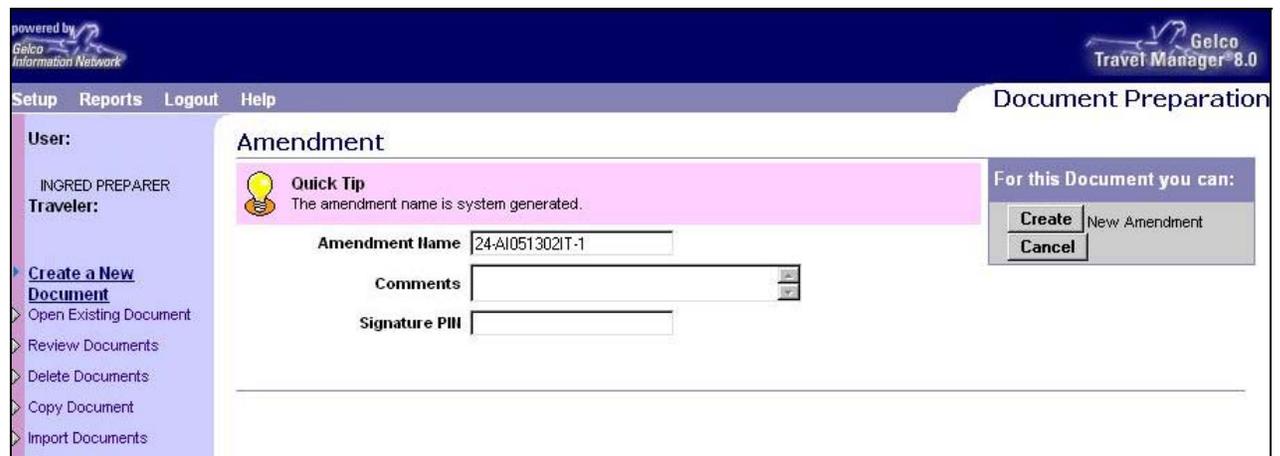
3. Click in the **Last Name** field under the **Enter Search Criteria** area and enter the last name of the traveler (or a portion of the name). The **Traveler Listing (Amendment)** page will be displayed with a list of travelers on the left side of the page.



- Click the **SSN** link of the desired traveler in the **Traveler List** area on the left side of the page. All documents that are available for the selected traveler to amend will be displayed in the **Document List** in the **Document Search (Amendment)** area on the right.



- Click the **Document** icon of the document to be amended. The **Amendment** page will be displayed.



**NOTE**

Notice the **Amendment Name** is pre-filled with the name of the original document and the last two (2) characters “-1” are added. Each time an amendment is created for an authorization the number attached will be increased by one (1).

6. Enter comments in the **Comments** area to explain the reason for amending the original voucher. Example: “Amended – Contract Hotel became available on 05/14/02.”



7. Click in the **Signature PIN** field and enter the appropriate PIN.
8. Click the **Create** **New Amendment** button in the ‘For this Document you can:’ area in the top right. The **Document Summary** page will be displayed.

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Document Preparation

Setup Reports Logout Help

User: INGRID PREPARER  
Traveler: ILENE TRAVELER  
Authorization: 24-AI051302IT-1

**Document Summary**

- Traveler
- Itinerary
- Ticketed Trans
- Expenses
- Lodging/M&IE
- Accounting
- Totals
- Comments
- Document Status
- Perform Pre-Audits
- Preview Document
- Export Document
- Close Document

**Document Summary for Authorization 24-AI051302IT-1**

**Quick Tip**  
For specific information, click on a Details link. You can sign and stamp your document from the Document Status section.

**Travel Authorization Number** 24-AI200003  
[Traveler Details](#) 240-00-0009, ILENE TRAVELER

**Purpose Description** 5 Days TM training in Wash, DC & Annapolis, MD.

**Itinerary Details**  
WASHINGTON,DC 05/13/02 - 05/15/02  
ANNAPOLIS,MD 05/15/02 - 05/16/02  
WASHINGTON,DC 05/16/02 - 05/17/02

**Ticketed Trans Details** \$400.00

**Expense Details**  
**Expense Summary**

Quick Expense	Edit	Delete	Date	Expense	Amount
			05/17/2002	RENTAL CAR	140.00
<b>Total:</b>					140.00

**Lodging M&IE Details** \$650.00

**Other Authorizations Details** <No Other Authorizations Details>

**Accounting Details**  
**Accounting Summary**

Label	Amount
24-AI2-09200000	1,190.00
<b>Total:</b> 1,190.00	

**Totals Details**  
**Totals Summary**

Disbursement Type	Amount
Estimated Cost	1,190.00
Advance Requested	0.00

**Enter Comments** Voucher due 5 days after completion of your trip

**Document Status**  
Document Status: CREATED    Awaiting: INGRID PREPARER  
Status To Apply    Signature PIN    Remarks

Enter Status/PIN to stamp this document

**Stamp and Route**

**For this Document you can:**  
 Document  
 Entering Document  
 Current Document

9. Click the **Continue** button, in the ‘For this Document you can:’ area in the top right, or click on the **Itinerary** link on the Document Processing Toolbar on the left side of the page. The **Itinerary Information** page will be displayed.

**B. ITINERARY**

Setup Reports Logout Help Document Preparation

User: A PREPARER2  
 Traveler: A1 TRAVELER2  
 Authorization: 24-XX051300AT-1

**Itinerary Information for 24-XX051300AT-1**

**Quick Tip**  
 The Begin Travel and End Travel fields must be completed before a per diem location can be added. Remember to save your itinerary before continuing.

For this Document you can:  
 Itinerary

**Trip Information**

Travel Authorization Number 24-BA200003  
 Purpose TRAINING  
 Description 5 Days TM training in Wash, DC & Annapolis, MD.  
 Auth Date 02/03/2002  
 Type SINGLE  
 Trip No 1

**Departure and Return Information**

Begin Travel 05/13/2002 Depart  
 End Travel 05/17/2002 Return  
 Trip Duration Multiple days  
 Comments Voucher due 5 days after completion of your trip

Depart Selection  
 Return Selection

**Per Diem Locations**

Replace ALL lodging and M&IE information on this document.

Edit/Delete	Arrival Date	Location	Departure Date
	05/13/02	WASHINGTON,DC	05/15/02
	05/15/02	ANNAPOLIS,MD	05/16/02
	05/16/02	WASHINGTON,DC	05/17/02

1. Review and make any necessary changes to the itinerary page.
2. Click the  button, in the 'For this Document you can:' area in the top right, or click on the **Ticketed Trans** link, on the Document Processing Toolbar on the left side of the page, if any ticket information additions/changes are necessary. The **Ticketed Transportation** page will be displayed.

## C. TICKETED TRANSPORTATION

The screenshot shows the 'Document Preparation' section of the DFRC Travel Manager web application. The main heading is 'Ticked Transportation for Authorization 24-XX051300AT-1'. A 'Quick Tip' box states: 'To enter ticket information, click Add. Previously entered ticket information can be edited (Pencil icon) or deleted (X icon)'. Below this is a table with the following data:

Ticket No	Dep Date	Type	Cost	Depart	Arrive	CR	CL	Tax
See Itinerary 1	05/13/02	AIR	400.00					no

In the top right corner, there is a section titled 'For this Document you can:' with buttons for 'Add Ticket', 'Back', and 'Continue'.

1. Review and make any necessary changes to the ticketed transportation.
  - a. Click the **Pencil** icon to edit Ticked Transportation records for necessary changes.
  - b. Click the **X** icon to delete Ticked Transportation records, if necessary.
  - c. Click the **Add Ticket** button, in the 'For this Document you can:' area in the top right, to add another ticket item if necessary.
2. Click the **Continue** button, in the 'For this Document you can:' area in the top right, or click on the **Expenses** link, on the Document Processing Toolbar on the left side of the page, if any expense additions/changes are necessary. The **Expense Entry** page will be displayed.

**D. EXPENSES**

Setup Reports Logout Help Document Preparation

User:  
A PREPARER2  
Traveler:  
A1 TRAVELER2  
Authorization: 24-XX051300AT-1

Expense Entry for 24-XX051300AT-1

**Quick Tip**  
The Arrow icon indicates a required field. Click Save to save the current expense and refresh the screen so a new expense can be added.

Date: 05/13/2002

Expense Type: [Dropdown]

Expense Description: [Text Field]

Miles Traveled: [Text Field]

Rate Selection: [Dropdown]

Rate: [Text Field]

Cost: [Text Field]

Comments: [Text Area]

For this Document you can:  
Use Quick Expense  
Use Foreign Calculator  
Lookup Credit Card Expenses  
Save Current Expense  
Done Entering Expenses  
Back Continue

Copy Through Date: [Text Field]

Cost Options  
\* Reimbursable  
\* Taxable  
Expense Category: [Text Field]  
Pmt Method: [Dropdown]  
Vendor: [Dropdown]

Action	Date	Expense	Amount
	05/17/2002	RENTAL CAR	140.00

Total: 140.00

1. Review and make any necessary changes to the expenses.
  - a. Click the **Pencil** icon to edit Expense records for necessary changes.
  - b. Click the **X** icon to delete Expense records.
2. Click the **Continue** button, in the 'For this Document you can:' area in the top right, or click the **Lodging/M&IE** link, on the Document Processing Toolbar on the left side of the page, if any Lodging or M&IE expense changes are necessary. The **Lodging/M&IE** page will be displayed.

## E. LODGING/M&IE

Setup Reports Logout Help Document Preparation

User: A PREPARER2  
Traveler: A1 TRAVELER2  
Authorization: 24-XX051300AT-1

**Lodging/M&IE for 24-XX051300AT-1**

**Quick Tip**  
An asterisk (\*) in the Special column indicates that a condition has been selected in the Advanced Lodging/M&IE window.

For this Document you can:  
 Lodging and M&IE expenses

Date	Reset	Replicate	Ldg Cost	Ldg Allowed	M & IE Allowed	Per Diem Rate	Special	B	L	D	Cont %
05/13/02			119.00	119.00	34.50	119 / 46					
05/14/02			119.00	119.00	46.00	119 / 46					
05/15/02			90.00	90.00	42.00	90 / 42					
05/16/02			119.00	119.00	46.00	119 / 46					
05/17/02			0.00	0.00	34.50	119 / 46					

1. Review and make any necessary changes to the **Lodging/M&IE** data.
2. Click on the **Pencil** icon next to the **05/14/02** date to modify lodging costs due to the change in availability of the contract hotel. The **Update Lodging and M&IE** page will be displayed.

Setup Reports Logout Help Document Preparation

User: A PREPARER2  
Traveler: A1 TRAVELER2  
Authorization: 24-XX051300AT-1

**Update Lodging and M&IE Expenses for 24-XX051300AT-1 (05/13/02)**

**Quick Tip**  
For this lodging day, you can edit specific actuals, leave data, meals provided status, lodging amount, and if desired apply these changes forward using the apply through tool.

For this document you can:  
 Expense  
 Expense Changes  
 Lodging and M&IE  
 Without Saving Changes

Apply Through Date: 05/14/2002

**Lodging**  
Per Diem Rate: 119 / 46  
Lodging: 119.00

**Conference Allowance**  
 Conference Allowance   
 Conference Rate:

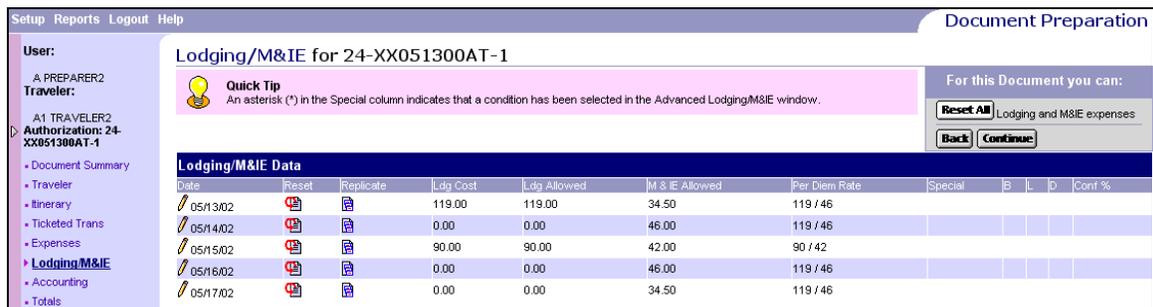
**Actuals**  
 Lodging Limit: 0.00  
 Meals  
 Breakfast: 0.00  
 Lunch: 0.00  
 Dinner: 0.00  
 Incidentals: 0.00

**Leave Data**  
 None  
 Annual  
 Other  
 Hours: 0

**Meals Provided**  
 Breakfast  
 Lunch  
 Dinner

3. Click in the **Lodging** field and enter **0.00**.
4. Click the  **Expense Changes** button in the 'For this Document you can:' area in the top right. The **Lodging/M&IE** page will be displayed again. Notice the amount did not change. **Note: The changes will need to be entered twice for the changes to take effect. This is a Gelco glitch and we are currently working with them to alleviate this situation.**

5. Click on the **Pencil** icon  next to the **05/16/02** date. The **Update Lodging/M&IE** page will be displayed.
6. Click in the **Lodging** field and enter **0.00**.
7. Click the  **Expense Changes** button in the 'For this Document you can:' area in the top right. The **Lodging & M&IE** page will be displayed. Notice the amount did not change. **Note: The changes will need to be entered twice for the changes to take effect. This is a Gelco glitch and we are currently working with them to alleviate this situation.**



Setup Reports Logout Help Document Preparation

User: A PREPARER2  
 Traveler: A1 TRAVELER2  
 Authorization: 24-XX051300AT-1

**Lodging/M&IE for 24-XX051300AT-1**

**Quick Tip**  
 An asterisk (\*) in the Special column indicates that a condition has been selected in the Advanced Lodging/M&IE window.

For this Document you can:  
 Lodging and M&IE expenses

Date	Reset	Replicate	Lodg Cost	Lodg Allowed	M & IE Allowed	Per Diem Rate	Special	B	L	D	Cont %
05/13/02			119.00	119.00	34.50	119 / 46					
05/14/02			0.00	0.00	46.00	119 / 46					
05/15/02			90.00	90.00	42.00	90 / 42					
05/16/02			0.00	0.00	46.00	119 / 46					
05/17/02			0.00	0.00	34.50	119 / 46					

- a. Notice the lodging values for 05/14/02 and 05/16/02 have been changed to 0.00.
8. Click the  **Continue** button in the 'For this Document you can:' area in the top right. The **Master List of Other Authorizations** page will be displayed.

## F. OTHER AUTHORIZATIONS

1. There are two ways to display the **Other Authorizations** page.
  - a. By clicking the  button, in the 'For this Document you can:' area in the top right, of the **Lodging/M&IE** page as shown previously.

OR
  - b. By clicking the **Document Summary** link, on the Document Processing Toolbar on the left side of the page, and then clicking on the **Other Authorizations Details** link, located beside the **Accounting Summary** area of the **Document Summary** page. There is no direct link on the Document Processing Toolbar on the left side of the page as for all other areas within the document.
2. The following is a sample list of available **Other Authorizations**. Browse the list to determine if and/or what approvals are necessary for the document. To select a specific other authorization for the document, click on it. The selected other authorization will be removed from the list and will be placed at the bottom of the page in the **Other Authorizations for Current Document** area. This will allow entry of any additional information required for approvals and/or will cause the document to be routed to a specific reviewer/approver. See the *Travel Manager 8.0 DFRC Standard Procedures Guide* for more information.

### NOTE

*The **Other Authorizations** with a double asterisk (\*\*) indicates that additional information is required. After selection, the other authorization must be clicked on at the bottom of the page to open a text area to enter additional information.*

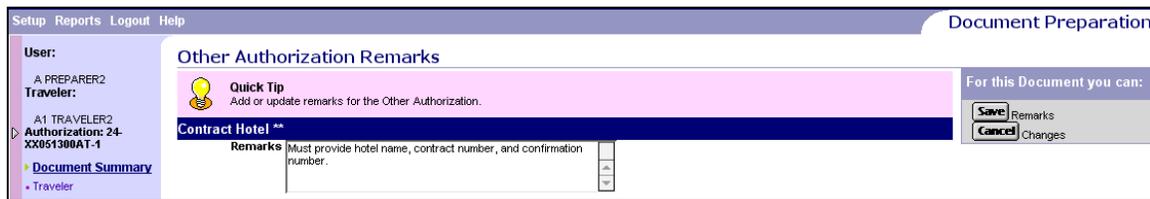
*The **Other Authorizations** that are in UPPER CASE will cause conditional routing to occur. For example, if PERMISSIVE TRAVEL (Cost Sharing)\*\* is selected, the conditional Approver/Reviewer will be added to the routing list when the authorization is stamped/signed.*



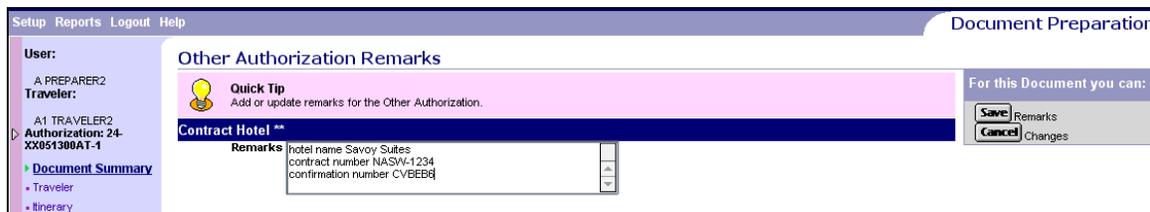
- Notice the item selected is now listed at the bottom of the page in the **Other Authorizations on Current Authorization** area.



- Click on **Contract Hotel \*\*** in the **Other Authorizations on Current Authorization** area (it has double asterisks (\*\*)) next to the name and requires additional information to be entered in the remarks). The **Other Authorizations Remarks** page will be displayed.



- Delete the initial preset remark “Must Provide”. The preset remark is sometimes unnecessary and can make the printed authorization confusing. Note: If the preset remark supplies fill-in fields, then fill in the blanks and do not delete the preset remark.



- Click in the **Remarks** field and enter the name of the contract hotel, the contract number and the confirmation number. Example: “Hotel: **SAVOY SUITES**, Contract #: **NASW-1234**, Confirmation #: **CVBEB6**”.
- Click the **Save** **Remarks** button in the ‘For this Document you can:’ area in the top right. The **Other Authorizations** page will be displayed again.
- Click the **Continue** button, in the ‘For this Document you can:’ area in the top right, or click on the **Accounting** link on the Document Processing Toolbar on the left side of the page. The **Available Accounting Codes** page will be displayed.

## G. ACCOUNTING

Setup Reports Logout Help Document Preparation

User: A PREPARER2  
 Traveler: A1 TRAVELER2  
 Authorization: 24-XX051300AT-1

Available Accounting Codes for 24-XX051300AT-1

**Quick Tip**  
 Once two or more accounting codes are selected, the Allocation button is enabled.

For this Document you can:  
 Add New Accounting Code  
 Back Continue

Enter Search Criteria  
 Accounting Code  Search Retrieve

**Master Accounting Codes** Click Accounting Label to add to Document

Search Results Prev 10 Next 10

Organization	Label	Classification Code
24-BA	24-BA2-09200000	0920000...24.2.8.00.BA.000
24-BA	24-BA2-09225TRN	0920025.03...24.2.7.00.BA.TRN
24-BA	24-BA2-71035000	7103500...24.2.8.00.BA.000

**Accounting Codes for 24-XX051300AT-1** Click an item to edit/delete it

Organization	Label	Classification Code	Extended Code
	24-BA	24-BA2-09225TRN 0920025.03...24.2.7.00.BA.TRN	Extended

Edit Delete

- Review and make any necessary changes to the accounting codes. Add another account code if necessary.
  - Click the label in the **Master Accounting Code** list to place it in the **Accounting Codes for this Document** area at the bottom of the page.
  - Click the **Pencil** icon to edit Accounting Code records for necessary changes.
  - Click the **X** icon to delete Accounting Codes records.
- If more than one accounting code is funding the travel, an **Allocate** link will be displayed at the bottom of the page to the right of the **Extended Code** column. Click on the **Allocate** link to review the allocation of expenses to ensure proper distribution of funds to the correct account code.
- Click the button, in the 'For this Document you can:' area in the top right, or click on the **Totals** link on the Document Processing Toolbar on the left side of the page. The **Totals** page will be displayed.

## H. TOTALS

Setup Reports Logout Help Document Preparation

User:  
A PREPARER2  
Traveler:  
A1 TRAVELER2  
Authorization: 24-XX051300AT-1

• Document Summary  
• Traveler  
• Itinerary  
• Ticketed Trans  
• Expenses  
• Lodging/M&IE  
• Accounting  
• **Totals**  
• Comments  
• Document Status

**Total Details for 24-XX051300AT-1**

**Quick Tip**  
Click the View Advances for Document to add or update an advance.

**Total Estimated Expenses:** 952.00  
**Computed Advance Authorized:** 0.00  
**Advance Requested:** 0.00

For this Document you can:  
[View Advances for Document](#)

Expense Category Details			
Expense Category	Organization	Account Label	Amount
COM.CARRIER	24-BA	24-BA2-09225TRN	400.00
LODGING	24-BA	24-BA2-09225TRN	209.00
M&IE	24-BA	24-BA2-09225TRN	203.00
RENTAL CAR	24-BA	24-BA2-09225TRN	140.00

Expense Category Advance Details	
Expense Category	Advance

1. The **Expense Category Details** area, in the middle of the page, shows the allocations of funds by expense category. An account label in the Expense Category Advance Details area shows if an advance has been requested.
2. Click the  button, in the 'For this Document you can:' area in the top right, or click on the **Comments** link on the Document Processing Toolbar on the left side of the page. The **Comments** page will be displayed.

## I. COMMENTS

The screenshot shows the 'Comments for 24-XX051300AT-1' page. On the left is a navigation menu with 'User: A PREPARER2 Traveler: A1 TRAVELER2 Authorization: 24-XX051300AT-1' and links for 'Document Summary', 'Traveler', 'Itinerary', and 'Ticketed Trans'. The main area has a 'Quick Tip' box stating: 'Click Apply and preset comments are inserted into the Comments field. Comments can also be typed directly into the comments field. Comments apply to the entire document.' Below this is a 'Comments' text area containing: 'Voucher due 5 days after completion of your trip. Changed lodging costs to \$0.00 for 05/14 & 05/16. Contract hotel became available on 05/14.' On the right is a 'For this Document you can:' toolbar with buttons: 'Apply' (Preset Comments), 'Save' (Comments), 'Back', 'Continue', and 'Close' (without Saving Comments).

1. Click in the **Comments** field under the existing comments. Enter the detailed description of the reason for the amendment: **“Changed lodging costs to \$0.00 for 05/14 and 05/16 - Contract hotel became available on 05/14”**.
2. Click the  **Comments** button in the ‘For this Document you can:’ area in the top right. The **Document Summary** page will be displayed.
3. On the **Document Summary** page, click the **Document Status** link on the Document Processing Toolbar on the left side of the page. The **Status** page will be displayed.

## J. DOCUMENT STATUS

Setup Reports Logout Help Document Preparation

User:  
A PREPARER2  
Traveler:  
A1 TRAVELER2  
Authorization: 24-XX051300AT-1

**Quick Tip**  
The Signature PIN is case sensitive

For this Document you can:  
**Stamp** and Submit Document  
**Adjustments** Go To Adjustments  
**Back** **Continue**

Status to Apply:

Signature PIN:

Remarks:

**Document Routing** This is the routing path the current document will take once routed

Name	Status	Level
A PREPARER2	SIGNED	0

**Document History** This is the status history for this document

Date/Time	Status	Name	Remarks
07/10/02 9:55AM EST	CREATED	A PREPARER2	

1. Note the **Status to Apply** default value. It should be “**SIGNED**” for the preparer.
2. Click in the **Signature PIN** box and enter the **PIN**.
3. Click the **Stamp** and **Submit Document** button in the ‘For this Document you can:’ area in the top right. The **Pre-Audit Results** page will be displayed.

**K. PERFORM PRE-AUDITS**

Setup Reports Logout Help Document Preparation

User:  
A PREPARER2  
Traveler:  
A1 TRAVELER2

**Pre-Audit Results for 24-XX051300AT-1**

**Quick Tip**  
Click the Magnifying Glass icon to view detail comments for each audit process.

Document Name: 24-XX051300AT-1  
Type: Authorization  
Traveler: TRAVELER2, A1  
Status: PASS

For this Document you can:  
 Stamping the Document  
 Pre-Audit Results

Pre-Audit Results			
	Audit Process	Status	Comments
<input type="checkbox"/>	ACTUALS EXIST	PASS	
<input type="checkbox"/>	APPROVED BY TRAVELR1	PASS	
<input type="checkbox"/>	APPROVED BY TRAVELR2	PASS	
<input type="checkbox"/>	APPROVED BY TRAVELR3	PASS	
<input type="checkbox"/>	CASH ADVANCES EXIST	PASS	
<input type="checkbox"/>	CONFERENCE ALLOWANCE	PASS	
<input type="checkbox"/>	DAILY EXPENSE THRESH	PASS	
<input type="checkbox"/>	EXP CATEGORY USED	PASS	
<input type="checkbox"/>	EXP CATEGORY USED1	PASS	
<input type="checkbox"/>	EXP CATEGORY USED2	PASS	
<input type="checkbox"/>	EXPENSE CATEGORIES	PASS	
<input type="checkbox"/>	LAUNDRY/DRY CLEANING	PASS	
<input type="checkbox"/>	LEAVE EXISTS	PASS	
<input type="checkbox"/>	MILITARY PERSONNEL	PASS	
<input type="checkbox"/>	NON CONTRACT AIRFARE	PASS	
<input type="checkbox"/>	OTHER AUTHORIZATIONS	PASS	
<input type="checkbox"/>	OTHER EXPENSES	PASS	
<input type="checkbox"/>	OVERRIDE	PASS	
<input type="checkbox"/>	PERSONAL INFO - KEY	PASS	
<input type="checkbox"/>	TRAVEL MODES	PASS	
<input type="checkbox"/>	TRIP DURATION	PASS	
<input type="checkbox"/>	TRIP DURATION1	PASS	

1. Review the **Pre-Audit Results** for the authorization.
2. If any audit fails, the word 'FAIL' will appear in the **Status** column. A comment describing the failure will appear in the **Comments** column. A 'FAIL' may actually be a warning to draw attention to a particular process to ensure the preparer has entered and reviewed the data correctly.

**NOTE**

If changes are necessary to the document prior to signing click on the  **Pre-Audit Results** button in the 'For this Document you can:' area in the top right. The document will not be signed and will not route. The document can be modified without adjustment at this time.

If an Audit Process needs explanation, click the  **Pre-Audit Results** button in the 'For this Document you can:' area in the top right. The Comments page will be displayed and the explanation may be entered in the text box.

*Do not use back button.*

3. Click the  **Stamping the Document** button in the 'For this Document you can:' area in the top right. The document is complete and has been routed.
4. An e-mail message will be sent to the first person in the routing list stating that a document requires attention in the Travel Manager System.

**NOTE**

*The authorization is approved when the final person in the routing list has stamped the document.*

*An e-mail is sent to the Traveler to confirm the document has been processed*

*The Traveler can print the authorization any time after the document has been stamped by the final person in the routing list.*

## L. OPEN EXISTING DOCUMENT (VIEW/UPDATE)

1. Click the **Open Existing Document** link on the Document Processing Toolbar on the left side of the page. The **Traveler Listing (Open Document)** page will be displayed.

Setup Reports Logout Help

User: A PREPARER2  
Traveler:

Create a New Document  
**Open Existing Document**  
 Review Documents  
 Delete Documents  
 Copy Document  
 Import Documents

Document Preparation

Traveler Listing (Open Document)

**Quick Tip**  
Type one or more letters of the traveler's last name and click Search. Then, click the traveler's name to list all documents.

Enter Search Criteria

Last Name: trav

Document Type: ALL

Traveler List Click on an entry to select it

Search Results		Prev 40	Next 40
Name	ID		
TRAVELER2_A1	240-00-0101		

2. Enter one or more characters of the last name of the traveler and click the  button located to the right of the **Last Name** field.
3. Click on the name of the desired traveler in the **Traveler List** of the **Traveler Listing (Open Document)** area.

Setup Reports Logout Help

User: A PREPARER2  
Traveler:

Create a New Document  
**Open Existing Document**  
 Review Documents  
 Delete Documents  
 Copy Document  
 Import Documents

Document Preparation

Traveler Listing (Open Document)

**Quick Tip**  
Type one or more letters of the traveler's last name and click Search. Then, click the traveler's name to list all documents.

Enter Search Criteria

Last Name: trav

Document Type: ALL

Traveler List Click on an entry to select it

Search Results		Prev 40	Next 40
Name	ID		
TRAVELER2_A1	240-00-0101		

Document Search (Open Document)

Document List Click on an entry to select it

Traveler: A1 TRAVELER2

Type	Document Name	Dep Date	Status	In Use
Authorization	24-XX051300AT	05/13/02	DATA LINK	
Authorization	24-XX051300AT-1	05/13/02	SIGNED	
Authorization	24-XX040702AT	04/07/02	DATA LINK	
Authorization	24-AA02-11TX	02/11/02	CREATED	
Authorization	24-AA021102AT	02/11/02	CREATED	
Voucher	24-XX040702AT	04/07/02	SIGNED	
Voucher	24-AA021102AT	02/11/02	CREATED	

4. All documents created for that traveler will be displayed in the **Document List** of the **Document Search (Open Document)** area on the right.
  - a. **Documents** that have been created but not routed will have **CREATED** in the **Status** column.
  - b. Documents that have been created and routed will have various stamp values in the **Status** column, some of which may be **SIGNED**, **ADJUSTED**, **REVIEWED**, **APPROVED**, **MGT REVIEWED** or **MGT APPROVED**.
  - c. Documents that have been interfaced with the financial system will have **DATALINKED** in the **Status** column.

5. Click the document icon for the document created previously. The Open Document Version screen will display. Select the most recent version (the version with \*\*). This is the amended version.

Setup Reports Logout Help Document Preparation

User:  
INGRED PREPARER  
Traveler:

Create a New Document  
**Open Existing Document**  
Review Documents  
Delete Documents  
Copy Document  
Import Documents

Open Document Version for 24-AI051302IT-1

**Alert**  
Adjustments have been made to this document.  
Note that only the current version, marked by \*\*, may be further adjusted or routed.

For this Document you can:  
Cancel Opening Document

Document Version List Click on an entry to select it

Document Type	Level	Date	Time	Adjustor
AMENDMENT **	2	07/18/02	11:16AM	INGRED PREPARER
ORIGINAL	1	07/18/02	11:16AM	INGRED PREPARER

6. Once you click on Level 2's version, the **Open Document Signature** page will be displayed. If the preparer has not signed the document, the Open Document Signature will not be displayed and the Document Summary page will be displayed.

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Setup Reports Logout Help Document Preparation

User:  
Alice Preparer  
Traveler:

Create a New Document  
**Open Existing Document**  
Review Documents  
Delete Documents  
Copy Document  
Import Documents

Open Document Signature

**Quick Tip**  
The Signature PIN is case sensitive!

Signature for Adjustment

For this Document you can:  
Sign to Review Document  
Get Document as View-Only  
Cancel Opening Document

7. The document can be opened two ways.
  - a. Enter the appropriate signature PIN and click the **Sign** to Review Document button, in the 'For this Document you can:' area in the top right, to adjust the document.
  - OR
  - b. Click the **Get** Document as View-Only button, in the 'For this Document you can:' area in the top right, to open it as view only.

- Click the  **Document as View-Only** button in the ‘For this Document you can:’ area in the top right. The **Document Summary (View Only)** page will be displayed.



**User:**  
A PREPARER2  
**Traveler:**  
A1 TRAVELER2  
**Authorization: 24-XX051300AT-1**

**Document Summary**

- Traveler
- Itinerary
- Ticketed Trans
- Expenses
- Lodging/M&IE
- Accounting
- Totals
- Comments
- Document Status
- Perform Pre-Audits
- Preview Document
- Export Document
- Close Document

**Document Summary for Adjustment to Authorization 24-XX051300AT-1 (View Only)**

**Quick Tip**  
For specific information, click on a Details link. You can sign and stamp your document from the Document Status section.

**For this Document you can:**  
 Entering Document  
 Current Document

**Travel Authorization Number** 24-BA200003  
**Traveler Details** 240-00-0101, A1 TRAVELER2

**Purpose Description** 5 Days TM training in Wash, DC & Annapolis, MD.  
**Itinerary Details** WASHINGTON,DC 05/13/02 - 05/15/02  
 ANNAPOLIS,MD 05/15/02 - 05/16/02  
 WASHINGTON,DC 05/16/02 - 05/17/02

**Ticketed Trans Details** \$400.00

**Expense Summary**

Edit	Delete	Date	Expense	Amount
		05/17/2002	RENTAL CAR	140.00
				<b>Total: 140.00</b>

**Lodging/M&IE Details** \$412.00  
**Other Authorizations Details** Contract Hotel \*\*

**Accounting Summary**

Label	Amount
24-BA2-09225TRN	952.00
<b>Total: 952.00</b>	

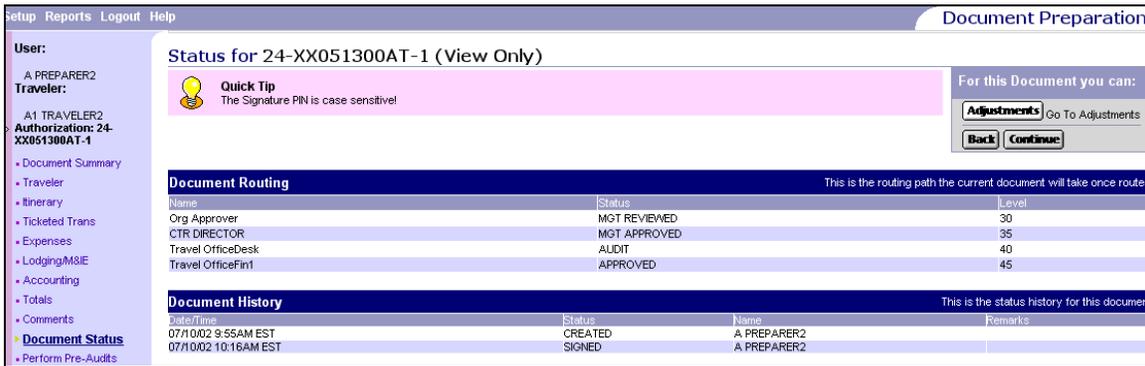
**Totals Summary**

Disbursement Type	Amount
Estimated Cost	952.00
Advance Requested	0.00

**Enter Comments** Voucher due 5 days after completion of your trip. Changed lodging costs to \$0.00 for 05/14/ & 05/16 Contract hotel became available on 05/14.

**Document Status** **Document Status** Enter Status/PIN to stamp this document  
 Document Status: SIGNED - Awaiting: Org Approver  
 Status To Apply:  Signature PIN:  Remarks:

- Click the **Document Status** link on the Document Processing Toolbar on the left side of the page to view the **Status** page.



**User:**  
A PREPARER2  
**Traveler:**  
A1 TRAVELER2  
**Authorization: 24-XX051300AT-1**

**Document Status**

- Document Summary
- Traveler
- Itinerary
- Ticketed Trans
- Expenses
- Lodging/M&IE
- Accounting
- Totals
- Comments
- Document Status**
- Perform Pre-Audits

**Status for 24-XX051300AT-1 (View Only)**

**Quick Tip**  
The Signature PIN is case sensitive

**For this Document you can:**  
 Go To Adjustments

**Document Routing** This is the routing path the current document will take once routed

Name	Status	Level
Org Approver	MGT REVIEWED	30
CTR DIRECTOR	MGT APPROVED	35
Travel OfficeDesk	AUDIT	40
Travel OfficeFin1	APPROVED	45

**Document History** This is the status history for this document

Date/Time	Status	Name	Remarks
07/10/02 9:55AM EST	CREATED	A PREPARER2	
07/10/02 10:16AM EST	SIGNED	A PREPARER2	

- Click the **Close Document** link on the Document Processing Toolbar on the left side of the page to close the document.